Monday, 12 January 04

Opening Remarks

Administrative & Process Matters: *Joe Mercier (Facilitator), & Scribe*
- Introductions
- Rules of Conduct; Meeting Approach
- Meeting Agenda
- Objectives of this IPT session (pass out copies) [*See Friday Wrap Up session*]
- Action Items from IPT-1 [completed items labeled as [*Done*]]
  - Define how to measure qualitative acceptability → Kip Shearer [*Done*]
  - Catalog which functional areas are currently serviced by small business/ 8A → Pat [*Done*]
  - Language relating to IT security for the PWS → Ruby [*Done*]
  - Language relating to Technology Insertion → Ruby [*Done*]
  - Language relating to continuity of operations → Ruby [*Done*]
  - List of all reference documents and forms → Pat
  - Definition of all acronyms and abbreviations as related to IT services → Pat [*Done*]
  - Revisit quality assurance performance requirement and description → Pat [*Done*]
  - Technical publication support – in or out? → Donna [*Done*]
  - Logistics – in or out? → Donna [*Done*]
  - Make all documentation related measures/standards consistent ("…Gunning Fog Index…" → Joe, Edith [*Done*]
  - Fill in response times for performance matrix → Eric [*Done*]
  - Incentives tied to levels of performance quality (e.g., for system development, a matrix of quality levels & criticalities) → Steve [*Drop*]
  - Define in the text all acronyms / abbreviations when first used → Joe [*Done*]

Review of feedback to IPT-1 material – WBS and draft PWS
- Comments incorporated in the draft PWS.

Today's Action Items
- PWS: need Background input on SDDC's IT organization --> Pat Thompson
- PWS: need summary Scope statement --> Pat Thompson
- PWS: reference the acronyms, definitions, etc., in Sect. 2 --> Ruby, Joe
- PWS: Move Sects. 3.1.1 & 3.1.2 under Sect. 2 --> Joe
- PWS: Under Sect. 3.1, need verbage --> Ruby

- ♦ PWS: Define acronyms in the text as they first appear --> Joe
- ♦ PWS: "Monitoring Method" statements -> move to QASP --> Joe
- ♦ PWS: Incentives/Disincentives -> goes in PRS (if any or applicable) --> DISCUSS
- ♦ PWS: Consider putting Severity Table in QASP --> Ruby, Joe
- ♦ PWS: Sect. 3.6 (QA) -> move to Sect. 4.0 (or something); needs to be re-written (removing P.O.'s) --> Ruby, Joe
- ♦ PWS: P.O. # 27 -> need Vulnerability table from Kim Quinn --> Ruby, Pat
- ♦ PWS: Have Kim Quinn check all of Sect. 3.7 --> Ruby, Pat
- ♦ PWS: Have Kim Quinn check Sect. 3.14, P.O. #55 ("Firewall Intrusion Detection" measure) --> Ruby, Pat

Today's Parking Lot Items
- ♦ None

Tuesday, 13 January 04

Review of Monday's accomplishments, review and add/revise action items (if any); review today's agenda

Continued review of feedback to IPT-1 material – WBS and draft PWS
- ♦ Comments incorporated in the draft PWS.

Input to, and review of, Definitions, Acronyms/Abbreviations, List of Reference Documents
- ♦ Comments are (or will be) incorporated in the draft PWS.

Identify which Functional Areas / Performance Objectives are currently supported by Small Business / 8A contractors
- ♦ Separately catalogued in a table entitled "IT Svcs_List of IT Contracts.xls"

Today's Action Items
- ♦ PWS: Insert Paula Mihalek's e-mail info on Customer Service as a table --> Joe
- ♦ PWS: Sect. 3.17 -> Eric Clatterbuck needs to verify --> Ruby, Pat
- ♦ PWS: Need a teleconferencing definition --> ?
- ♦ PWS: Sect. 3.19 -> Kitsy Young needs to verify; copy Bill Crennan --> Ruby, Pat
- ♦ PWS: Sect. 4.1, para.b3 -> send back to Security office , re: recommended changes --> Ruby, Pat
- ♦ List of Acronyms, Definitions --> Pat
- ♦ Move and revise the Quality Assurance material → Ruby, Joe

Today's Parking Lot Items
- ♦ None

Wednesday, 14 January 04

Review of Tuesday's accomplishments, review and add/revise action items (if any); review today's agenda (incl. measures & standards)

Finalize the identification of which Functional Areas / Performance Objectives are currently supported by Small Business / 8A contractors
- ♦ Separately catalogued in a table entitled "IT Svcs_List of IT Contracts.xls"
- ♦ Only one Functional Area appears to have been exclusively supported by small Business(es) – Multimedia Support

Identify which Functional Areas naturally aligned (→ affinity clustering)
- ♦ System Development, System Integration, Systems Deployment
- ♦ Program Management Support
- ♦ Research, Analysis & Design
- ♦ Systems Operation & Maintenance
- ♦ Content Management
- ♦ Network Operation/Support
- ♦ IV&V
- ♦ Training
- ♦ Change Management
- ♦ Data Management
- ♦ Multimedia Support
- ♦ Emergency Management
- ♦ Telecommunications Support
- ♦ Logistics
- ♦ Information Assurance
- ♦ Customer Support

Identify what contracts / contract types are appropriate
- ♦ Concerns raised about how SDDC would demonstrate [to various stakeholders such as SBA] that at least the current level of set-asides for small business would continue, within whatever chosen contract type
- ♦ The distinction was made between the two types of work to be contracted out – IT services (represented by the PWS from this IPT), and major systems acquisitions costs of greater than $__ million.
- ♦ The work represented by this PWS could be supported by a preponderance of small business contractors under a multiple award schedule. Firm statements / commitments to award a certain percentage of contracts and dollar volume directly to small business. Readily trackable. A cap on the dollar value of development / system acquisition work within this contract vehicle (such as "less than $5 million").

Today's Action Items

- ♦ Investigate issues or constraints related to small business set-aside provisions within contract types (such as multiple award schedule contracts) → Kip Shearer
- ♦ Identify the small business contracts that previously have been set aside – total number, total dollar volume → Ruby Mixon

Today's Parking Lot Items
- ♦ None

Thursday, 15 January 04

Review of Monday's accomplishments, review and add/revise action items (if any); review today's agenda

Define a draft Schedule B – Schedule of Services (CLIN's)
- ♦ Discussed and updated a draft list of contract labor categories and descriptions
- ♦ Will utilize sources of current "GSA GWAC" type of contract skills categories and descriptions as an initial baseline for input into Schedule B

Identify the critical Performance Objectives, which will be included in the Performance Requirements Summary (PRS) for each contract
- ♦ Inputs to the draft Performance Requirements Summary spreadsheet --> final draft

Review the draft Quality Assurance Surveillance Plan (QASP)
- ♦ Comments, corrections incorporated within the draft

Continue discussion on what are appropriate contracts / contract types
- ♦ Presentation by Kip Shearer on issues related to new provisions of DFAR's; also the topic of "bundling"
- ♦ Discussion of alternative contract types / approaches

Today's Action Items
- ♦ Distribute electronic copy of IT contracts spreadsheet (Ellen's detailed version) --> Joe
- ♦ Distribute electronic copy of IT contracts spreadsheet (Ruby's version) --> Joe
- ♦ Distribute electronic copy of IT contracts spreadsheet (master copy) --> Joe
- ♦ Acquire copies of current "GSA GWAC" type of contract skills categories and descriptions (to use for Sched. B input to this procurement package) --> Lorine, George
- ♦ Identify a feasible approach to a contract vehicle for IT Services that addresses the small business issue --> Kip Shearer

Today's Parking Lot Items
- ♦ None

Friday, 16 January 04

Review of Wednesday's accomplishments, review and add/revise action items (if any); review today's agenda

Define the Evaluation Factors to be used in evaluating contractor proposals for award **[SUGGESTED ITEM FROM BRAINSTORMING SESSION]**
- ◆ Past Performance
  - ➢ Direct Related Experience
  - ➢ Relevant Experience
  - ➢ Subcontracting
  - ➢ Customer Satisfaction (Quality)
  - ➢ Schedule Performance
  - ➢ Cost Control Performance
  - ➢ Risk Management
- ◆ Management
  - ➢ Teaming & Subcontracting Plan
  - ➢ Key Personnel
  - ➢ Organization Structure for the Contract
  - ➢ Management Capability
  - ➢ Understanding of the Client
  - ➢ Availability of Resources
  - ➢ Risk Management
  - ➢ Quality Assurance
- ◆ Technical Approach
  - ➢ Technical Innovation/Infusion
  - ➢ Key Resources
  - ➢ Approach (to solving hypothetical problem(s))
  - ➢ Best Approaches
  - ➢ Centers of Excellence
  - ➢ Certification & Accreditations
  - ➢ Specialized Resources
- ◆ Price
  - ➢ Price Reasonableness
- ◆ Submission Techniques
  - ➢ Written inputs
  - ➢ Oral presentations
  - ➢ Site visits

Continue discussion on what are appropriate contracts / contract types
- ◆ Ruby to investigate whether the Fort Monmouth SCP contract may be a suitable precedent for a contract type for SDDC IT Services → Pat Thompson to provide contact information about the contract

Review and discuss the Acquisition Plan, Source Selection & Evaluation Plan, and Technical Evaluators' Workbook

♦ This will be addressed in a subsequent IPT session **[GOVERNMENT ONLY SESSION]**

Wrap-up

♦ Review achievement of IPT Objectives
  ➢ Number & type of contract vehicles to be created? [*In Work*]
  ➢ Procurement process – schedule, approach, next steps & process efficiencies. [*In Work*]
  ➢ Procurement package that will guarantee sufficient qualified bidders will respond. [*Done*]
  ➢ A straightforward and flexible means to acquire resources.[*Done*]
  ➢ A contract that will support SDDC worldwide. [*Done*]
  ➢ The ability to get the right skill set or mix (incl. multifunctional positions). [*Done*]
  ➢ A comprehensive well written scope of work. [*Done*]
  ➢ All stakeholders are on the same page (and the right page). [*In Work*]
  ➢ The contract will permit the contractor to have purchase authority for… (what, how much). [*N/A*]
  ➢ Accommodate SDDC contingency operations at various locations TBD. [*Done*]
  ➢ A PWS, QASP with PRS, **Section B – Schedule of Rates, Evaluation Plan, Acquisition Plan.** [**In Work**]
  ➢ Need a "contract usage guide" or "ordering guide" for SDDC contract users.
  ➢ Ensure that a Technology insertion capability is included as a requirement. [*Done*]
  ➢ A multi-year contract that is compliant with current DOD policies and directives (distinguish between advisory/mandatory, all/part). [*In Work*]
  ➢ A contract package that will completely satisfy the customers. [*Done*]
  ➢ Any incentive approach has a practical plan for evaluation (direct correlation with contract requirements). [*In Work*]
  ➢ A Government risk management assessment is drafted that addresses any award term provisions or other incentives.
  ➢ Reasonable/achievable contract monitoring methods. [*Done*]
  ➢ Limitations of funding have been addressed. [*N/A*]
  ➢ Small business considerations have been adequately addressed. [*Done*]